1on1 DOC
Step-by-Step Instructions

Step 1 - Download Data
These are the 3 options for downloading data for your 1on1 DOC

    A. Manually Download Data Using Query Builder

    B. Manually Download Data Using Report Scheduler (our preferred option)

    C. Automatically Download Data Using Report Scheduler

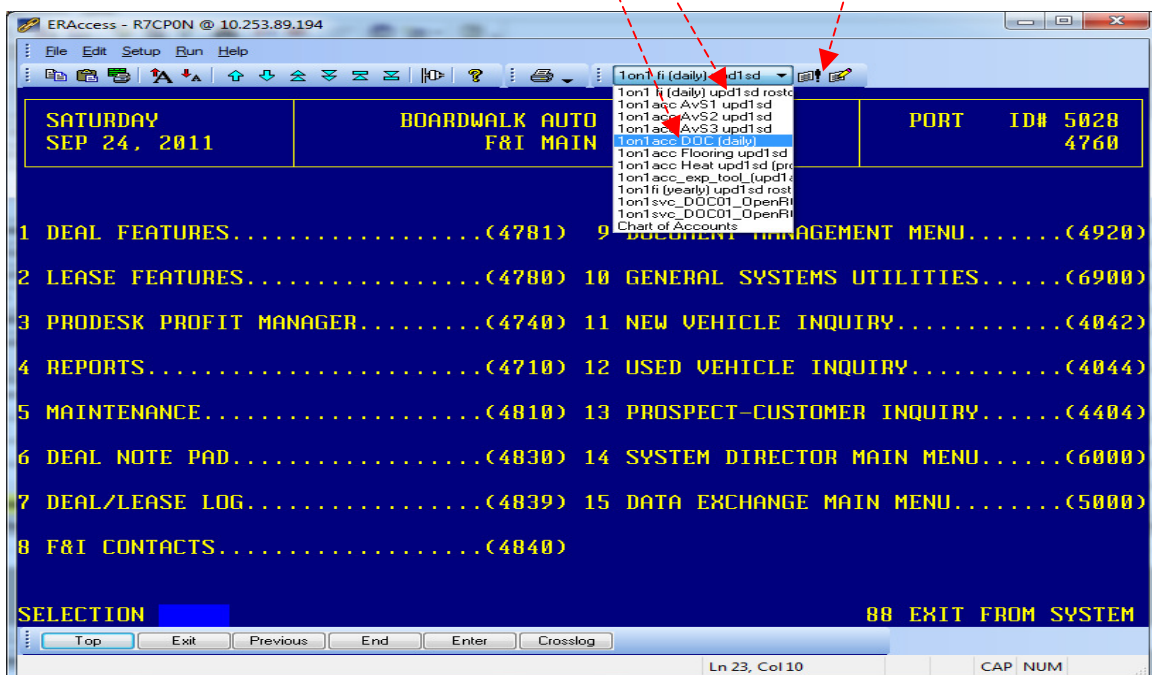**A.   Manually Download Data Using Query Builder**

    Benefits:
- Guarantees your data is current.
- Quick: Only takes about 2 minutes to run both files (typically).

    Drawbacks:
- Typically takes about 2 minutes to run (the 2 queries typically take less than 1 minute each).

The following assumes that you have already set up the shortcut icon (if not, then simply right-click in the light blue section of the ERAccess screen and select "Queries"). You need to download data from 2 separate files, one in F&I and the other in Accounting. These files can be scheduled to run unattended, but if you want the most current data, you should run the queries on demand, as follows:

- Log into your ERA F&I area for the appropriate dealership.
- Click the pull-down and choose "1on1 fi (daily)", then click the black explanation mark.
- Type "77" then choose your ERA Accounting area for the appropriate dealership.
- Click the pull-down and choose "1on1acc DOC (daily)", then click the black explanation mark.

Wait for the download to finish (typically between 15 to 60 seconds per file).

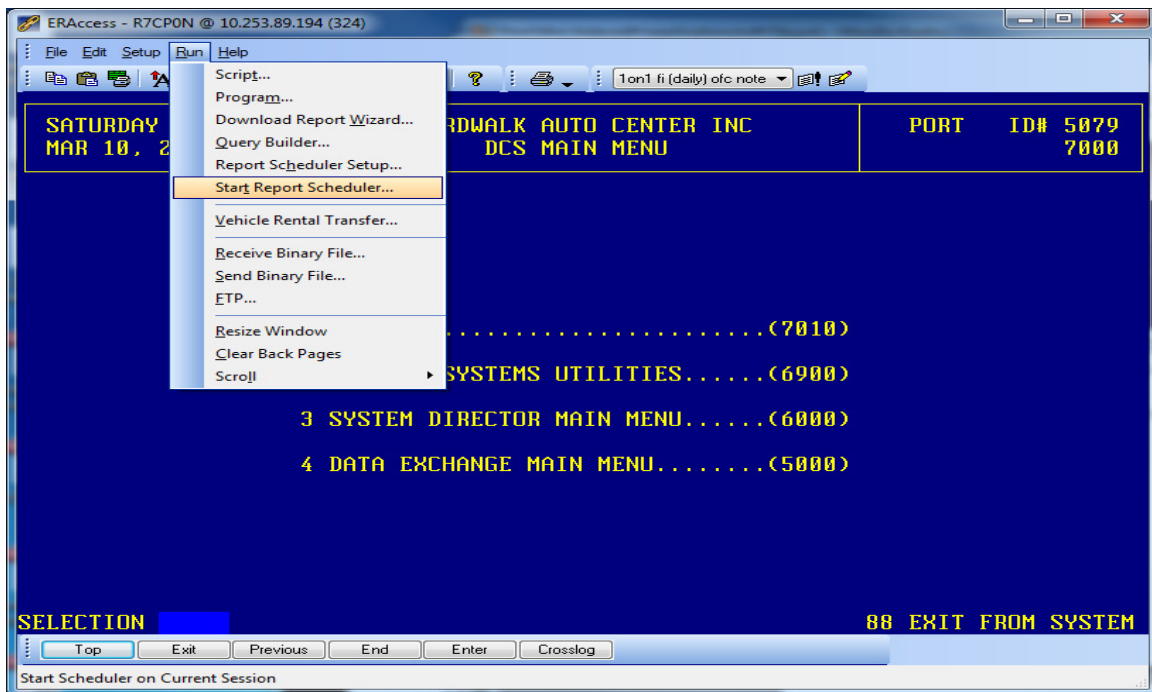**B.   Manually Download Data Using Report Scheduler (our preferred option)**

Benefits:
- Guarantees your data is current.
- Quick: Typically takes about 2 minutes to run.
- One click (Run Report Scheduler) will run multiple queries.
- This option causes the Report Scheduler to run at different clock times, which keeps Reynolds from locking out your ERA User ID (if they see a report running at the same time every day, Reynolds may assume that an outside company is grabbing your data (your data never goes to us … you are pulling your own data and it stays local).

Drawbacks:
- Typically takes about 2 minutes to run.
- You must remember to reset your password in the Report Scheduler every time you change your ERA password.
- If you want to manually run the Report Scheduler multiple times within the same day, you must manually change the option to "Run Now" (this is not difficult, but it does require a few additional clicks with the mouse).

Instructions: See section called "Setting Up Report Scheduler" on page 7+8.

- Log OUT of ERA (but do NOT close ERA).
- Click "Run", then "Start Report Scheduler", then click "Yes" to confirm (wait about 2 minutes).
- Note: if you have already run the Report Scheduler today, you will need to first click "Report Scheduler Setup", then right-click on the word "Due" to the right of your report name. A window will appear, then click "Run Now".
- Note: if it does not log in, then either your User ID or your Password is incorrect.

Wait for the download to finish (typically between 15 to 60 seconds per file).

C.   Automatically Download Data Using Report Scheduler

Benefits:
- Data is gathered automatically. Report Scheduler will log in, pull your data, then log out.
- Quick: Typically takes about 2 minutes to run.

Drawbacks:
- Your data will not be as current, compared to the other 2 options. Your data will be current as of the last successful running of the Report Scheduler. This may not be a problem if the Report Scheduler runs at 6am, and you typically run your management reports first thing in the morning.
- You must remember to leave Report Scheduler running in the background (log OUT of ERA, then hide the small window, then minimize that window).
- You must remember to reset your password in the Report Scheduler every time you change your ERA password.
- Reynolds + Reynolds may lock out your ERA User ID if they see a report running at the same time every day (they assume that an outside company is grabbing your data). Since your data never goes to us (you are pulling your own data and it stays local), it should not run afoul of any privacy issues. Still, you should be prepared to call them to explain that your data is NOT going to any outside company, in case they lock your User ID.

Instructions: See section called "Setting Up Report Scheduler" on page 7+8.

- Similar procedure as option "B" (above), except you will leave the Report Scheduler running in the background. This will NOT tie up a login session, and you can still log in to ERA with this running in the background.
- Log OUT of ERA (but do NOT close ERA).
- Click "Run", then "Start Report Scheduler", then click "Yes" to confirm.
- A window will appear showing the date and time of the next scheduled run.
- Click the check box to "Hide Session".
- Click the minimize button to shrink and hide the window (it will be at the bottom-left corner of your computer screen).
- Log into ERA as normal by clicking on your ERA icon on your desktop. This will NOT tie up a login session, and you can still log in to ERA with this running in the background.
- Note: if it does not log in, then either your User ID or your Password is incorrect.

Finished downloading data

# Step 2 – Open the "1on1 Sales Mgr Tool"

Make sure that you have downloaded data before proceeding (see previous section)

Open the "1on1 Sales Mgr Tool" icon (on your desktop)
Click "Login" to accept the license agreement

The following screen will open.

Make sure your **Date Range** is correct (this only affects New, Used and F&I figures; the date range for Parts, Service and Body Shop are changed in another section because the data pulls from the GL, rather than from the Sales department). By default, the system will assume that you want the current month's data, unless it is within the first 4 days of the month, then it is smart enough to assume that you then want the previous month's data. At any time, you can click on the yellow button to change date ranges if you want.

Click on "Custom" tab (at the top of the screen). Then click the appropriate button for your "1on1 DOC"
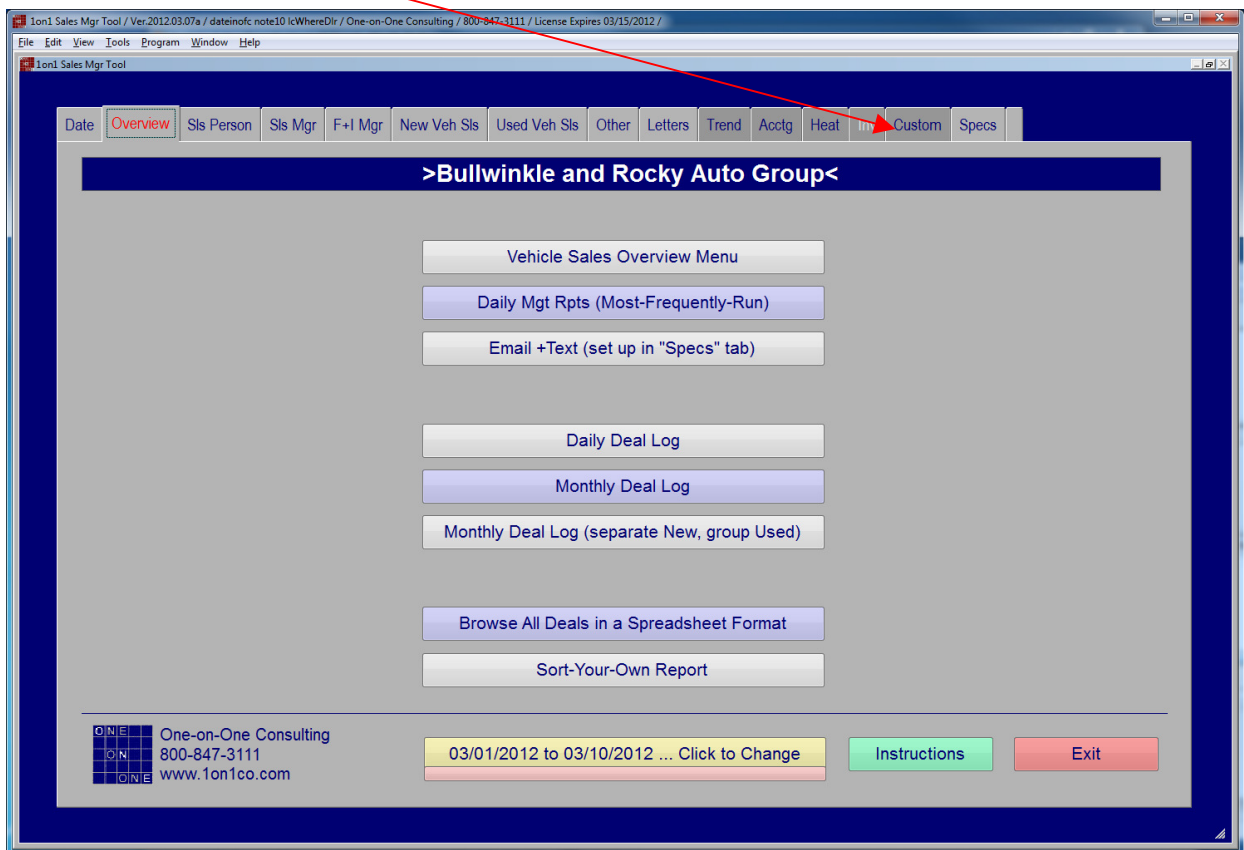
Step 3 – Launch the "1on1 DOC"

After you click the appropriate button for your "1on1 DOC" (in the step above), a Microsoft Excel file will open (it will be called "1on1_Exec_DOC_ver20XX", or something similar).

You should receive the following pop-up message. Just click "Enable Macros"

Microsoft Excel

C:\Users\Public\Documents\1on1\execdoc\01\1on1_Exec_DOC_ver2011C.xls contains macros.

Macros may contain viruses. It is always safe to disable macros, but if the macros are legitimate, you might lose some functionality.

| Disable Macros | Enable Macros | More Info |
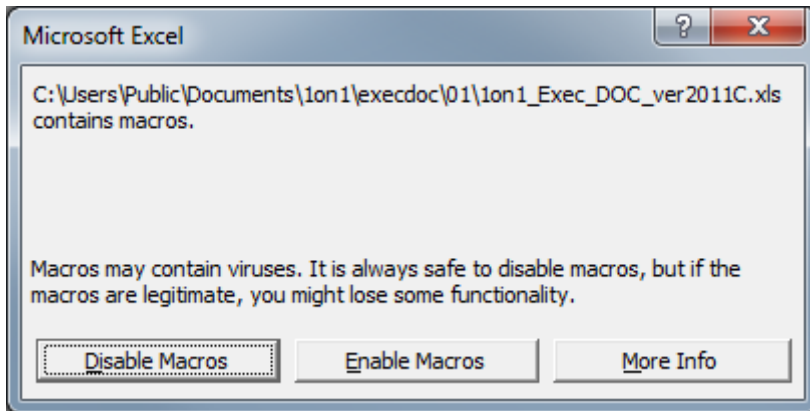
Next, the following screen should open up. Just click on the "Update" button and wait for it to process the newly downloaded data (about 15 seconds).

Finally, just print or view your Executive DOC.

Note: if the Excel macros do NOT run, you should do the following:
- Excel 2003 and earlier: click Tools, Macro, Security. Change from High to Medium Security.
- Excel 2010 and 2007: click the Windows logo at the top-left corner of Excel. Click Trust Center. Click Trusted Locations. Click Add Location. Click Browse and select the file location "c:\users\public\documents\1on1\execdoc" (select the option for subfolders). Click "OK" a few times to save these changes.

1on1 DOC
Hardware and Software Requirements

Using the "1on1 DOC" requires the following:

- A software license for our "1on1 Sales Mgr Tool" and our "1on1 DOC" (our software is licensed per dealership and allows for installation on multiple computers, provided they are installed and used by the particular licensing dealership. Dealerships with multiple stores require a separate license fee for each store and/or branch. If you have questions, please contact us at 800-847-3111).

- A software license for Microsoft Excel.

- A personal computer running Microsoft Windows 7, Windows Vista, XP, 2000.

- Reynolds ERAccess SERVER and Reynolds ERAccess CLIENT version 6.0.4 or higher.

- The person using the tool must have a Reynolds USER ID, with the following:

    o Access to the **F&I area** and the **Accounting area**)

    o Access to the following program executables: **7601**, **7602** and **4760**.

- Access to the internet: specifically our website: www.1on1co.com (to download updates).

- The person installing the "1on1 Sales Mgr Tool" must have installation privileges (contact your system administrator for assistance, if applicable).
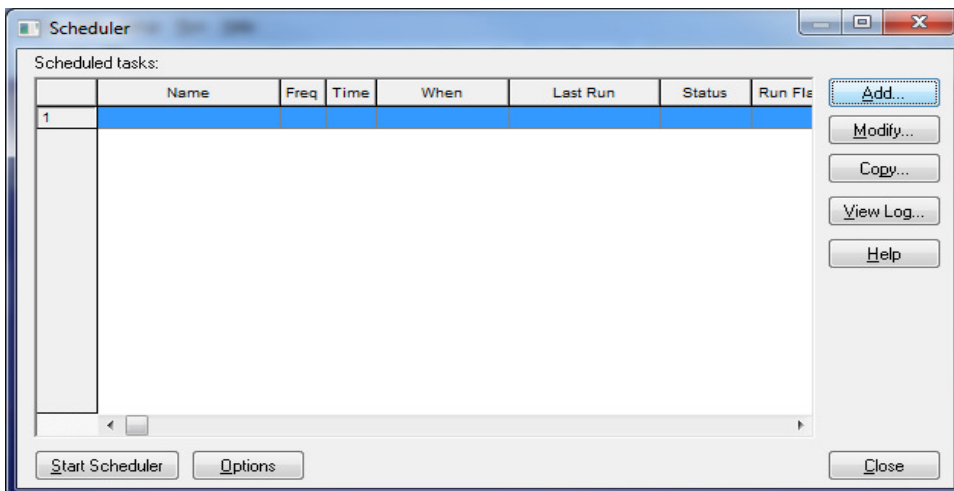
Setting Up Report Scheduler

Before using the Report Scheduler, you must have "1on1" installed.
Set up the Report Scheduler specs by doing the following:

Open ERA, click "Run", then click "Report Scheduler Setup".
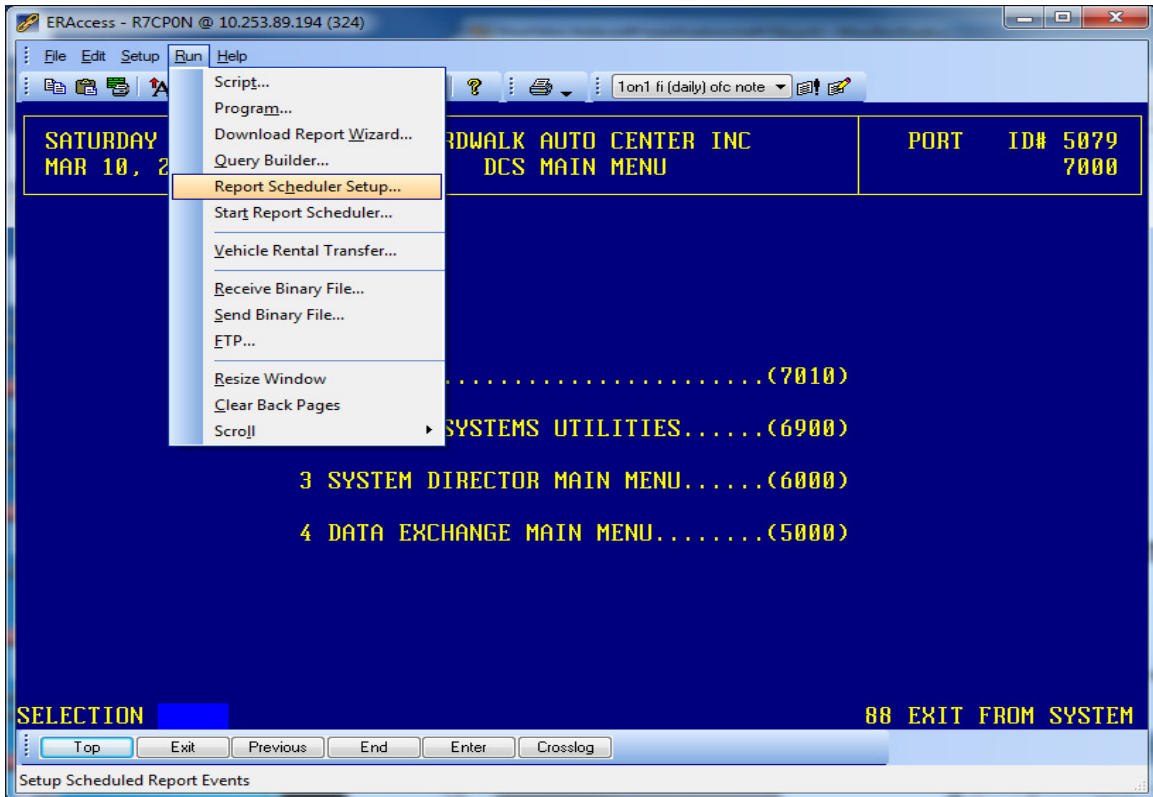
Click "Add".

You will then be prompted to give this particular schedule a name (ex: "Daily Management Reports").
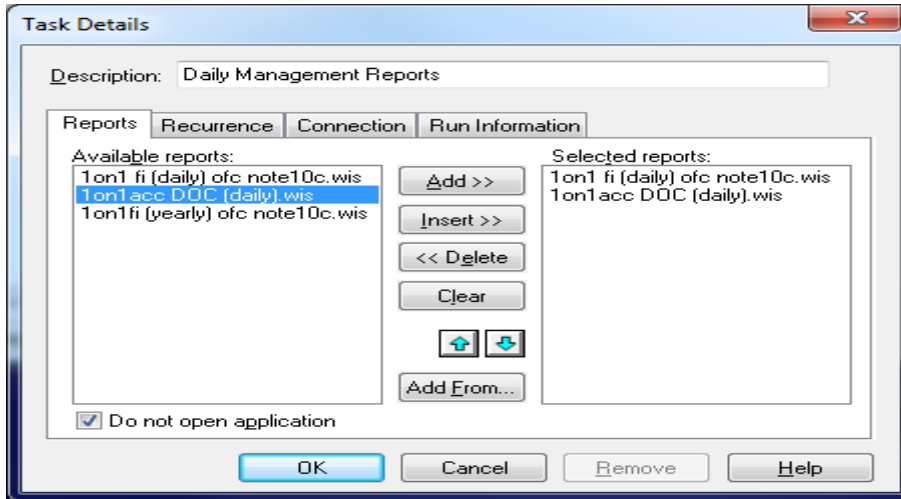

--- continued ---

You will need to select EACH of the 4 tabs below.

Start with the "Reports" tab.
- Double-click the report titled "1on1 fi (daily).wis" (it may be named a little differently).
- Double-click the report titled "1on1acc DOC (daily).wis" (it too may be named differently).

The above procedure will pull the selected reports over to the right side of the window.
Do NOT click "OK" yet.

Next, click the "Recurrence" tab.
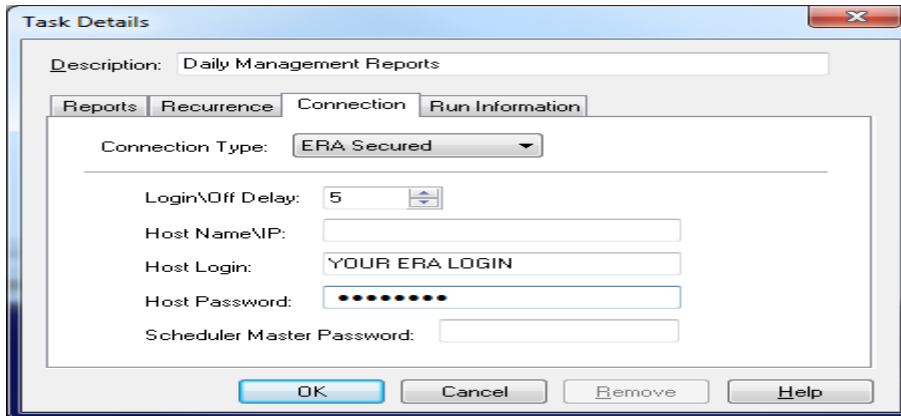Change the time to "6:00".
Do NOT click "OK" yet.

Next, click the "Connection" tab.
Enter your ERA User ID in the "Host Login" field.
Enter your ERA Password in the "Host Password" field.
(note: this is where you go to change your Report Scheduler password to match your ERA password)
Do NOT click "OK" yet.

Finally, click the "Run Information" tab.
Change the option from "Run When Due" to "Run Now" (we don't want to wait until 6:00am to test).
Click "OK" now (yes, it is finally okay).
Click "Close".
You should now be back at the ERA screen.

Test your Report Scheduler:
- Log OUT of ERA (but do NOT close ERA)
- Click "Run", then "Start Report Scheduler", then click "Yes" to confirm (wait about 2 minutes)
- Note: if it does not log in, then either your User ID or your Password is incorrect.